

Future Ready YOU!

‘Life By Design, not by Default.’

#BetterMe #BetterNow = #BetterLives #BetterFutures

CATE AMERICANO

CEO | Founder | Director

Inspiration Café Pty Ltd

www.inspirationcafe.com.au

#liveTHEdream.

About Me | Cate Americano



CEO | Founder | Director @ Inspiration Café | Wife & Mama 2 Teen Boys. Sydney.

Business & Life Coach, NLP Practitioner & Mindfulness, Mental Health First Aider.

30yrs FS. Last 20yrs working with leading FPs in Australia.

2020 (Post RC & COVID): Company Closed. Rehomed 360 Advisers. Leap of faith own Coaching Business. Practice what I preach. Experience 1st hand. Better Coach. Make a Difference Worthy Cause.

LEARNING & LISTENING: Conducted lots of Value's sessions. Chatted Clients, FPs, Peers, to ID Gap , PROBLEM solving & SERVICES world needs.

OBSERVED | 'Future Selfing': PAUSED to reflect on their PAST, REIMAGINE Futures. They started life designing. Many for the 1st time due to COVID.

NEW NORMAL: What to KEEP, DELETE and START? WHO do I want to join me. Same process My 40th. As good as it gets? Squeezed juice Life? Can I Do Better. Bucket List.

FUTURE READY! Help people build their ideal business/career to live their ideal life.
#BestofBothWorlds. #JuggleBetter #LiveTheDream. #BetterMe/Now #BetterFuture/Life



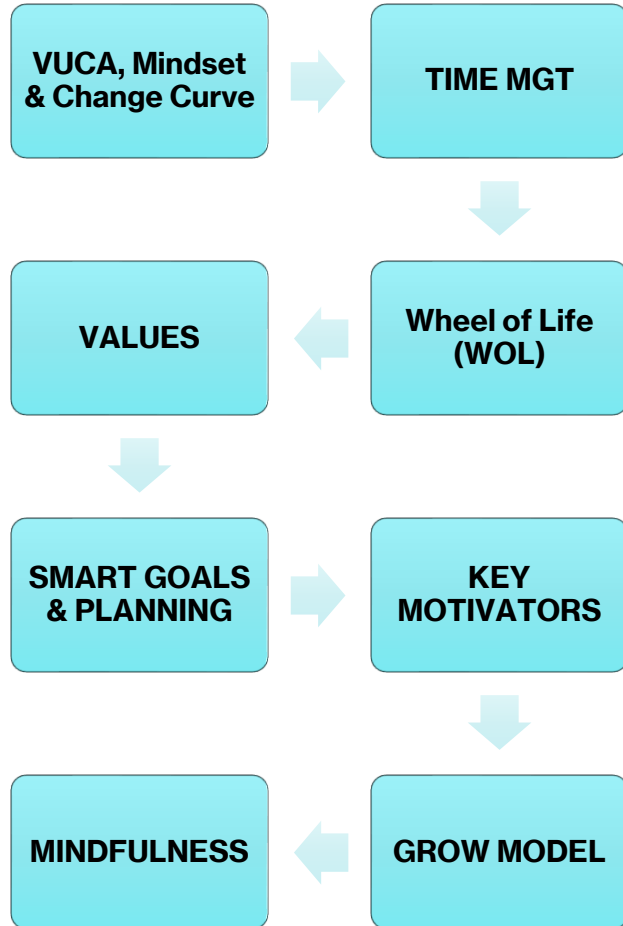
Privileged to Partner with Individuals & Businesses building 'Better Futures'

#BetterTogether | Ideas | Outcomes | Efficient | Fun



Agenda | Future Ready You! Tools, Tips & Insights

How to build better futures, thriving businesses & fulfilling lives.



****Everyone can use them****

****Gift: Pay it Forward****



It's COVID

V.U.C.A world...

We ALL need a plan!



VISION



UNDERSTANDING



CLARITY



AGILITY

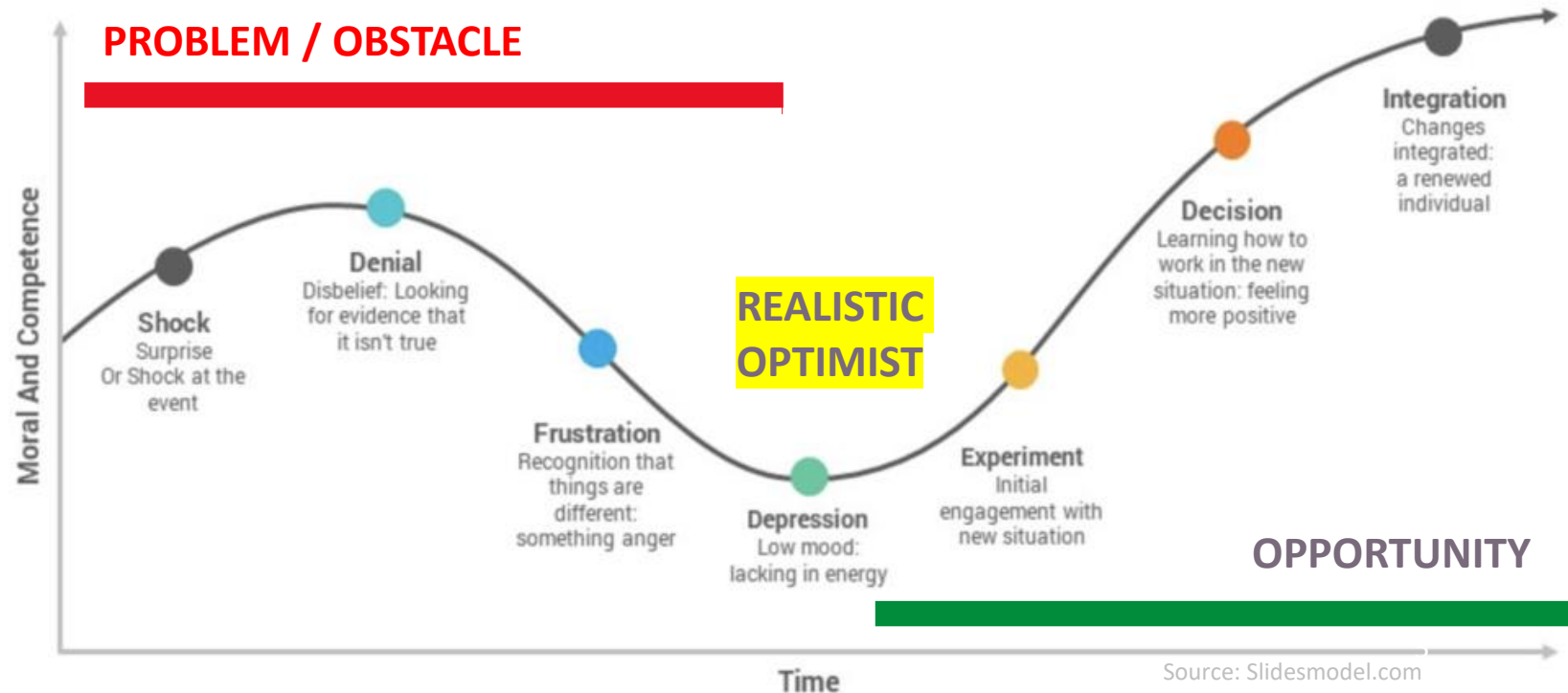
Source: Slidesalad.com

EVERYONE NEEDS AN ENTREPRENEUR MINDSET... THEY THRIVE IN DISRUPTIVE ENVIRONMENTS.

'DISRUPTION creates PROBLEMS, PROBLEMS create OPPORTUNITIES Entrepreneurs love solving MEANINGFUL PROBLEMS.' Daniel Priestly.

Kübler-Ross Change Model Curve Template

Emotional Response to Change





Who has a Plan/Goals?

(Life, Career, Business)

QUICK POLL

A. No! Nothing Nada!

B. Yes! In my head.

C. Yes! Written down + Actions.

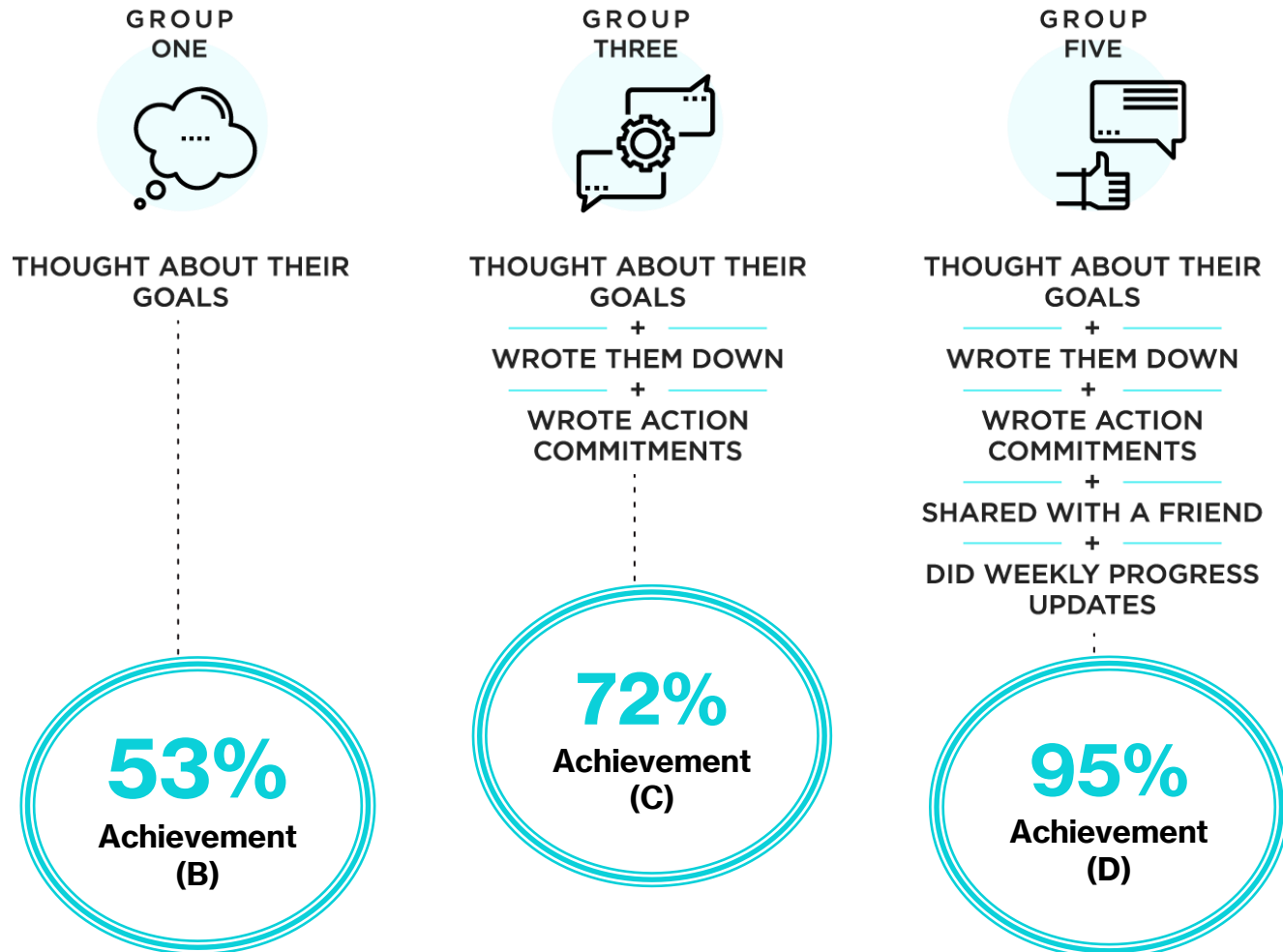
D. Yes! Written down + Actions + Told a Friend + Regular Check-Ins.



Facts | Goal Achievement

DOMINICAN UNIVERSITY RESEARCH BY DR GAIL MATTHEWS:
the real facts about Goal Achievement

dominican.edu/sites/default/files/2020-02/gailmatthews-harvard-goals-researchsummary.pdf



“
A dream with a date becomes a goal. A goal broken into steps becomes a plan. A plan backed by actions makes your
DREAMS COME TRUE.

G.S REID

Only **22%** of Australian Advice Businesses have a 12-month operational Business Plan. (Business Health – Future Ready IX).



Every Business needs a Plan! Best RMs/PDMs in the Country: Ask for Help.

'Future Ready YOU' RoadMap | 1 Page Plan

Current REALITY

"If we were meeting 1-3 years' from now, what would have had to of changed **PERSONALLY, PROFESSIONALLY, BUSINESS** for you to be happy with your progress?" (D.Sullivan).

PERSONAL



Your
Best Thinking
5 Years ago
is Baggage
Today.
Review Regularly

PROFESSIONAL

BUSINESS

Future VISION

PERSONAL

PROFESSIONAL

BUSINESS

▲ LIST 3 key ACTIONS/GOALS BRIDGE the GAP between **CURRENT & FUTURE.**

- What **DIFFERENCE** will it make **DO SOMETHING?**
- What will it **COST** if you **DO NOTHING?**

Personally | Emotionally | Professionally | Financially

ARE YOU STRIKING A BALANCE?

24 HRS IN A DAY:



8hrs **WORK**



8hrs **REST**



8hrs **PLAY**



TIME



Most precious GIFT you can give ANYONE including YOURSELF.

Are you INVESTING it wisely:

- Doing what you love.
- With People you love,
- Or could you do better?
- What should you Stop, Start, Keep doing?

**YOU ARE THE
AVERAGE OF
THE FIVE
PEOPLE YOU
SPEND THE
MOST TIME
WITH.**

Jim Rohn

DEVELOPGOODHABITS.COM

ASK YOURSELF:
What do they have you:

- Thinking
- Doing
- Reading
- Behaving.

Will your 'Future Self' thank you?

**Choose wisely.
Level Up. Proximity
Own it!**

My IDEAL DAY (WEEK | MONTH | QUARTER | YEAR | LIFE!)

TIME	MON	TUES	WED	THUR	FRI	SAT	SUN
5-6AM							
7AM	Rocks Pebbles Sand		Stop Start, Keep		Outsource Delegate, Automate		
8AM							
9AM							
10AM							
11AM							
12PM							
1PM							
2PM							
3PM							
4PM							
5PM							
6PM							
7PM							
8PM							
9PM							
10PM							

If it's
IMPORTANT,
it deserves an
APPOINTMENT.

“

What does your IDEAL DAY/WEEK look like from morning to night (Personally & Professionally)?

”

“

Who are the most IMPORTANT PEOPLE in your life? How often would you like to see them?

”

“

What time of the day are you MOST/LEAST PRODUCTIVE and what WORK is best done then? When do you plan your week, have team, strategy, and management meetings?

”

WHEEL OF LIFE (WOL)

How happy are you?

8 sections on Wheel of Life that represent different aspects of your life.

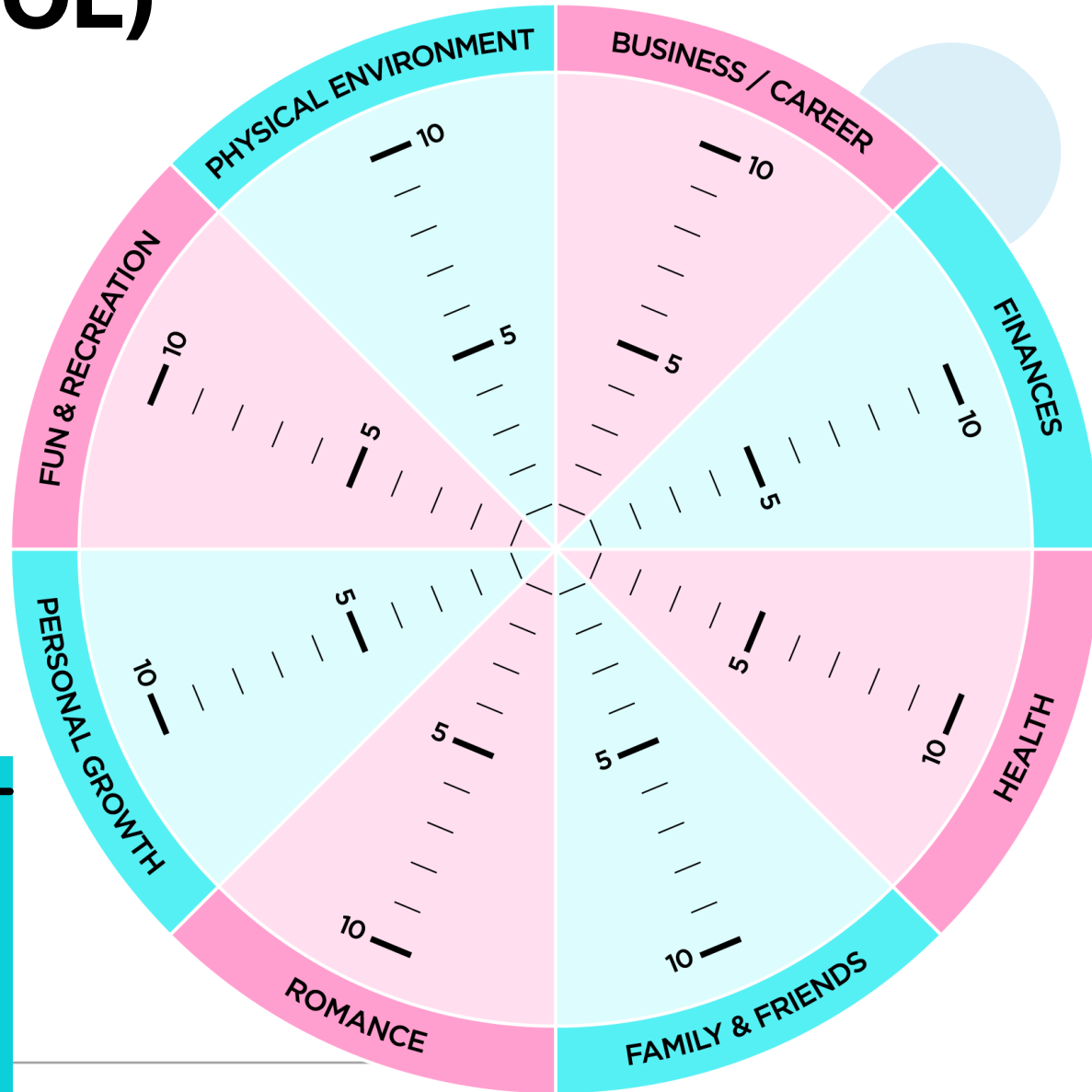
Rate your satisfaction with each section, 1 = least satisfied and 10 = most satisfied.

1. **Connect** the dots.
2. How **balanced** or **bumpy** is your life?
3. What **three areas** focus this year?

SUCCESSFUL ≠ HAPPY.

Happiness is a pre-cursor to success.
Define OWN version of both.

Happiness is a CHOICE each day.
Look for jolts of joy.



Top
3

1

2

3



QUICK POLL

How Happy and Balanced is your Life?

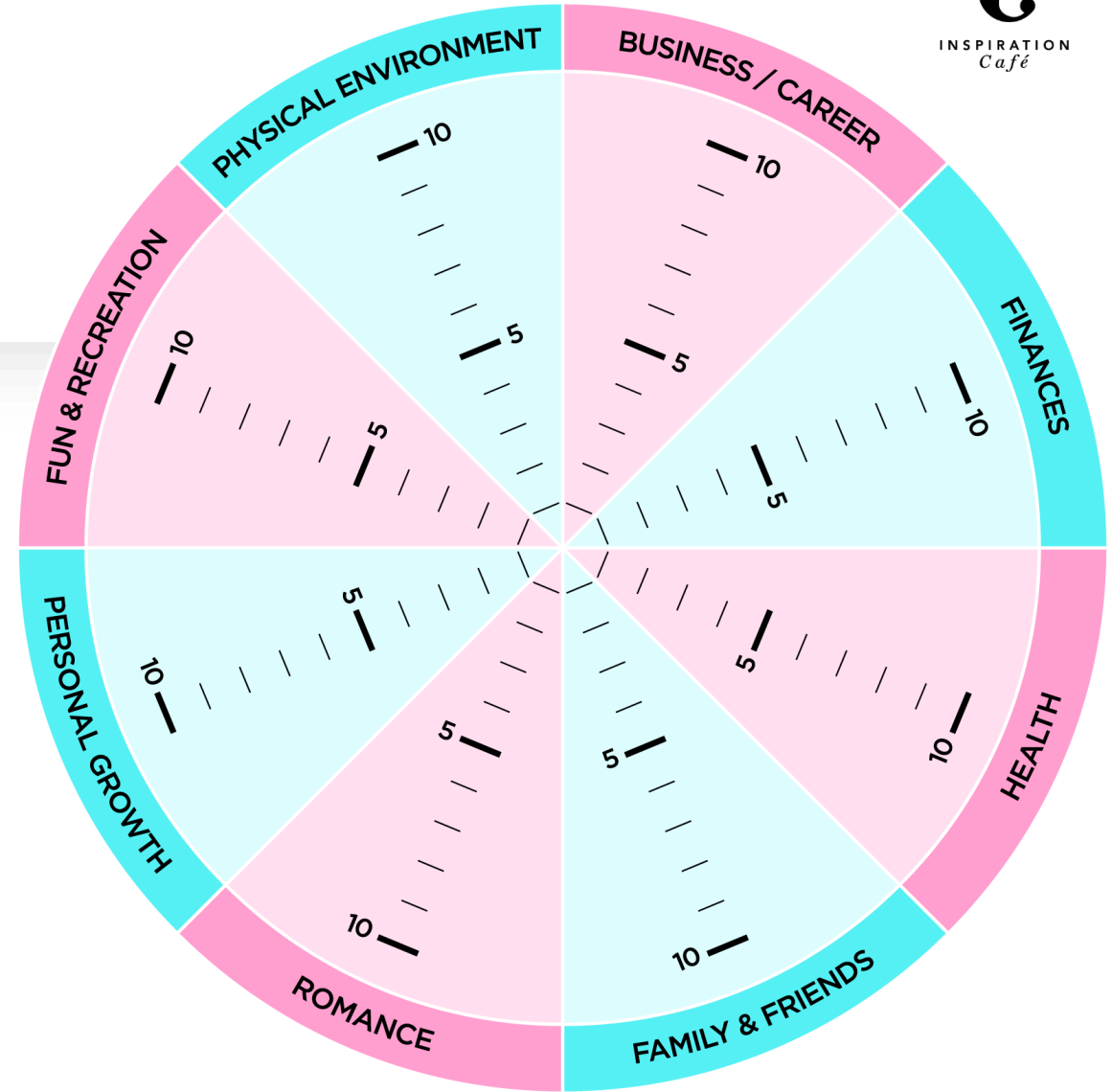
(Wheel of Life)

(A) Not going so well. (<5)

(B) Going OK. (5-6)

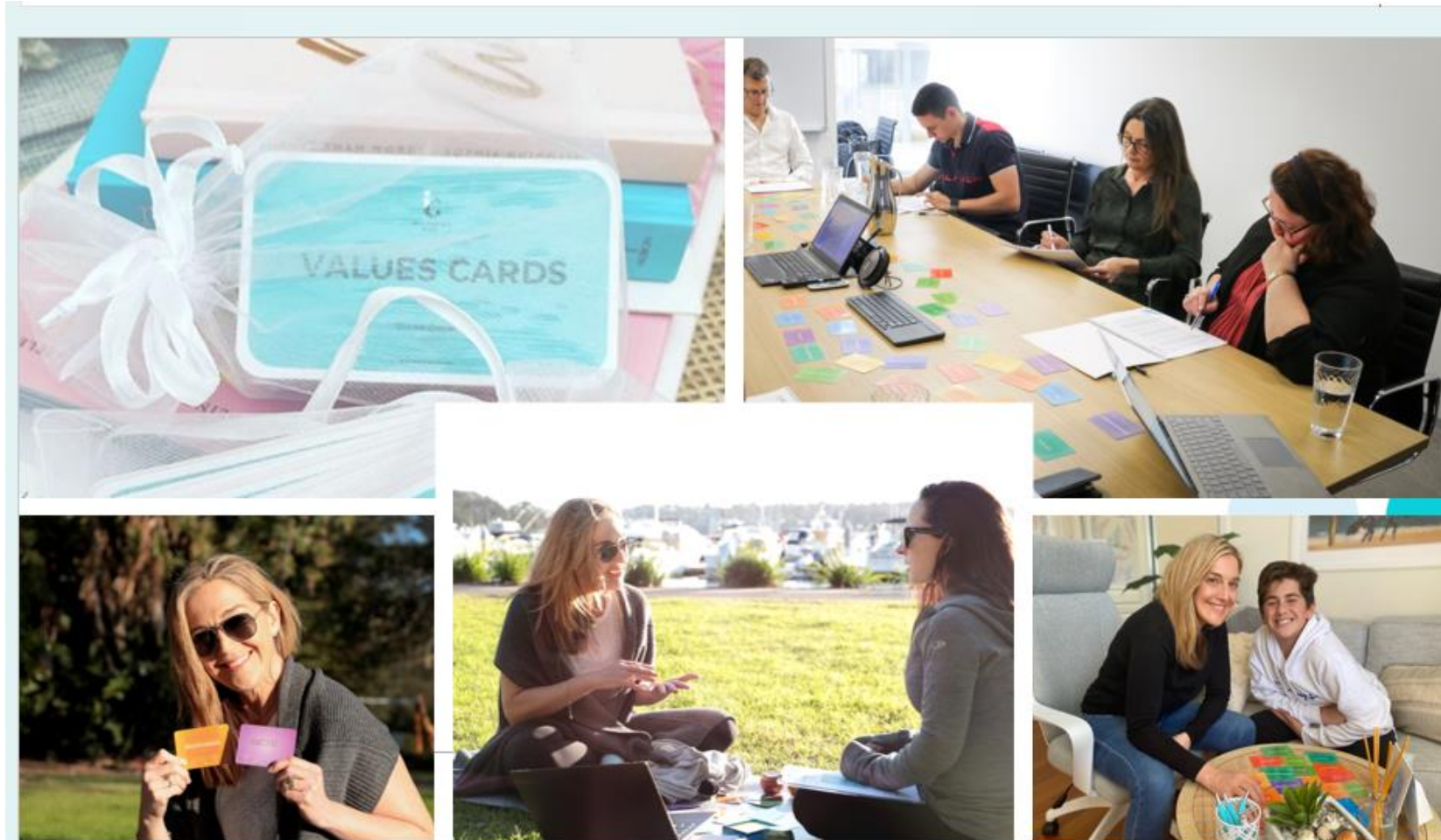
(C) Pretty Good. (7-8)

(D) Living the dream! (9-10)



WHAT ARE VALUES? WHY IMPORTANT?

WHY I LOVE THEM & HOW I USE THEM?



Personally:

**Use Daily
Habit Stack**

Loved Ones:

**Family,
Partner,
Friends, Kids.**

VALUES

Company:

**Values +
Behaviour =
Culture.**

EVP. VMV

Use:

**Cards (55),
Matrix (110),
Online Surveys**

Like to know what someone values?

Ask them their Top 5 Values and 1,2,3:

1

DEFINE IT!
WHAT MEANS TO YOU.

2

RATE IT /10!
HOW WELL LIVING IN ALIGNMENT.

3

ACTION IT!
1 ACTION TO IMPROVE COMING YEAR.

BIG difference between *Interesting vs Valuable!*

****Information is FREE | Insight is what you PAY for.****

My Mission

Help 1 Million People
Top 5 Values.

WHY?

It's how you live your
best life.

WORTHY CAUSE!

Values Transform

Lives, Families,
Relationships,
Teams, Cultures,
Companies,
Communities &
Futures.

People Leave

When their
values are no
longer
aligned.

My VALUES | Getting to Know YOU | Magic Minute!

Identify your own **Personal Values** by thinking about the 'ideal and real you'. From the list below **Select 1 Value** that resonates most with you, that could make a valuable difference to your life over next year.



ACTIVITY: Magic Minute! Share 1 Value with person next to you: (i) Define it (ii) Rate /10 (iii) 1 Action.

Abundance	Clarity	Discipline	Freedom	Integrity	Peace	Significance
Accountability	Comfort	Discretion	Generosity	Intelligence	Perfection	Simplicity
Achievement	Community	Discretion	Generosity	Intimacy	Persistence	Spirituality
Action	Competence	Discretion	Generosity	Kindness	Philanthropy	Spontaneity
Adventure	Competition	Discretion	Generosity	Knowledge	Play	Stability
Ambition	Connection	Discretion	Generosity	Leadership	Pleasure	Status
Autonomy	Contribution	Discretion	Generosity	Love	Power	Strength
Awareness	Control	Discretion	Generosity	Modesty	Privacy	Success
Balance	Cooperation	Discretion	Generosity	Optimism	Recognition	Teamwork
Beauty	Courage	Discretion	Generosity	Openness	Relationships	Tradition
Being the Best	Creativity	Discretion	Generosity	Optimistic	Religion	Truth
Calmness	Curiosity	Discretion	Generosity	Orderly	Respect	Vigour
Challenges	Decisiveness	Discretion	Generosity	Nature	Safety	Vitality
Change	Determination	Discretion	Generosity	Order	Security	Wealth
Cheerfulness	Development	Discretion	Generosity	Passion	Service	Work Ethic

Your Insights

What did you learn about You / Others?

How do/could you use elsewhere?

Common Values: Family, Health, Happiness.

My GOAL #1 | Personal or Professional

Knowing what you know now ... what is one goal towards your ideal life?

What is my GENERAL GOAL?											
Specific		Measurable		Attainable			Relevant			Timebound	
S		M		A			R			T	
How difficult is this goal to achieve? Scale 1-10, 10 being most difficult.											
What actions do I need to take to achieve this goal? Define the steps I will take.											
What problems may I face?											
What resources and support do I need to achieve this goal? Who can I turn to for help?											
How do I measure success? How do I define it?											
Buddy and frequency. Who will be my accountability buddy?		Name									
		Frequency									
		How									
How will I feel by achieving it?											
How will I celebrate success?											

Personal Goals

Key Themes



Health, Fitness, Wellbeing & Mindfulness



Life Work Balance & Time Mgt



Travel



Wealth



Personal Growth

Read at least 5 books this year.	Lose 5kg	Complete my first marathon in October 2023.	Improve myself both physically and mentally	Healthier
Follow the advice of our Financial Advisor to reduce our property mortgage	Better work life balance	Work at being	Cut down on my drinking :)	Lose weight
Completing all the jobs within the time frame.	First family holiday	Pass the upcoming review.	Travel outside my country.	Travel
To be able to give back to my family.	Run my second marathon at a quicker pace than my first.	Having a better work/life balance	Get on top of my finances	Being more cheerful and uplifting others
Make more time to bake - weekly task	Would like to spend more time with family by maintaining same income level.	Declutter. read 1 new book a month	My Health & Fitness	Enjoy more personal time
Make sure I find balance between me time and being a Mum	Passion project running and joining in community outreach programs.	Be more physically active and healthier	Get to 100 blood donations	Improve my presence at home on a more consistent basis.

Professional Goals

Key Themes



Growth / Training / Development



Targets & KPI's



Balance, Time Mgt & Productivity



Career Progression / Remuneration



Leadership & Business

Transition my role within the business

Place a practice manager who will take the business forward .

Be involved Future M & A discussions.

Build good relationships with clients

Fully map out my roles

Successfully train replacement

Step back from leading role

Build knowledge base with processes

Do more Projections, ROAS and SOA.

Become a fully fledged CSO

Exploring uncomfortable areas.

Become an equity holder

Stay employed

Senior Financial Planning Assistant

Salary Increase

Communicate with influence and impact.

Helping get the office work up to date

Education - understand some tax areas in much greater detail

Learn how to write Record of Advice's.

Achieve my KPI

Better Time Management. To work with less distractions

Better time management & organisation of systems

Achieve a work life balance

Help achieve better productivity

Learn new tasks, and level up at work.

Achieve budget

Achieve a total of 50 ongoing service clients

Increase my timeliness in client responsiveness

Structure Business for the next 5 years

Broaden my knowledge in the industry

SMART Goals | Process | Framework

What is my GENERAL GOAL?		<i>Be 40+ fit and fab!</i>							
<i>Specific</i>		<i>Measurable</i>		<i>Attainable</i>		<i>Relevant</i>		<i>Timebound</i>	
S	Lose 5 kilos by 30 th June 2021	M	Current weight = 85kg Target = 80kg	A	Workout 3 x per week: Sat, Sun, Mon for 1 hour; 10,000 steps per day	R	Improving my fitness and self-confidence	T	By 30 th June, 2021
How difficult is this goal to achieve? <i>Scale 1-10, 10 being most difficult.</i>								X	
What actions do I need to take to achieve this goal? <i>Define the steps I will take.</i>				Start TODAY!	Workout 3 x weekly	Eat healthy 5/7 days	Move my body every day: take stairs, walk etc.	10K steps per day or 1 hour gym session	
What problems may I face?				I may lose motivation. I may get sore from the exercise. I may not lose weight.					
What resources and support do I need to achieve this goal? <i>Who can I turn to for help?</i>				Scales, shoes, running gear, running buddy or gym.					
How do I measure success? <i>How do I define it?</i>				Weekly weigh in on scales and decreasing. Apple Watch for step count.					
Buddy and frequency. <i>Who will be my accountability buddy?</i>				<i>Name</i>	MA				
				<i>Frequency</i>	WEEKLY / DAILY				
				<i>How</i>	VERBALLY / EMAIL / PHONE				
How will I feel by achieving it?				In control, feel good. Will be a good role model for my family and children.					
How will I celebrate success?				Enjoy dinner out with my family!					

SMART Goals | Process | Framework

What is my GENERAL GOAL?		<i>Progress in my career: Do meaningful work I love that makes a difference for a worthy cause.</i>											
<i>Specific</i>		<i>Measurable</i>		<i>Attainable</i>			<i>Relevant</i>			<i>Timebound</i>			
S	Become <enter role eg Executive Manager, State Manager > of <Company>	M	Current: Exec Mgr. Target: State Mgr.	A	It is achievable. It's the next level up. ID current skills for role and gaps. Speak with Mgr. about applying.			R	PERSONALLY: happier doing work I love. PROFESSIONALLY: Be a leader to inspire others.			T	31 December 20__
How difficult is this goal to achieve? <i>Scale 1-10, 10 being most difficult.</i>											7/10		
What actions do I need to take to achieve this goal? <i>Define the steps I will take.</i>				Get a copy of the Job Description. ID current skill and gaps		Speak with Mgr. about the role, any insights for applying for it		Update CV to match the key requirements of role. Review LinkedIn profile		Update CV to match the key requirements of role. Review LinkedIn profile.		Apply for role by sending application letter and CV in email /website portal by dd/mm/yy	
What problems may I face?				The competition. Lack of support or endorsement from Manager.									
What resources and support do I need to achieve this goal? <i>Who can I turn to for help?</i>				My manager, people who have done the role before, other managers to endorse your work.									
How do I measure success? How do I define it?				Successfully achieving the role									
Buddy and frequency. <i>Who will be my accountability buddy?</i>				Name		My manager (name)							
				Frequency		Weekly Check-ins on Friday at 10am							
				How		30-minute Coffee Catchup							
How will I feel by achieving it?				Empowered and happy that I am doing work I love for the greater good.									

Key Motivators & Insights



FLEXIBILITY
WORK / LIFE



WORKING
CONDITIONS



CAREER
ADVANCEMENT



WORK
APPRECIATION



JOB
SECURITY



PAY &
BENEFITS

SELF-
ACTUALISATION

SELF-ESTEEM

LOVE & BELONGING

SAFETY & SECURITY

PHYSIOLOGICAL NEEDS

Key Insights: Survey Clients across 6 Key Motivators for past 4 years

1. Flexibility Life/Work:

Rates #1. No matter who you ask. Bring your 'whole self' to work. WFH. Hybrid, WOS

2. Working Conditions:

Is also very important. Nice Environment / Culture and Leaders to learn from.

3. Pay and Benefits:

Rates around 3-4. (Depends on audience and how well paid)

4. Career Advancement:

Varies within businesses.

5. Job Security:

Rated high over COVID. Less now.

6. Work Appreciation:

FREE! Recognition does cost you anything.

Maslow's Hierarchy of Needs

GROW Coaching Model

ASK not TELL = Empowerment



Goal

What is the GOAL/PROBLEM?
What do you want to ACHIEVE?



Reality

What is the current REALITY?
Where are you NOW?



Options

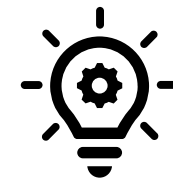
What are the OPTIONS?
What are the OBSTACLES?



Will

What is the best 'WAY FORWARD'
What WILL you do now?

Use GROW to HELP solve PROBLEMs. Don't end up with the MONKEY on Your Back!



Mental Health Facts

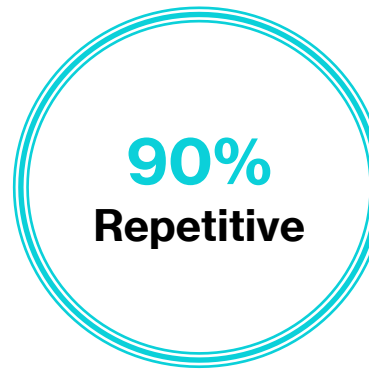
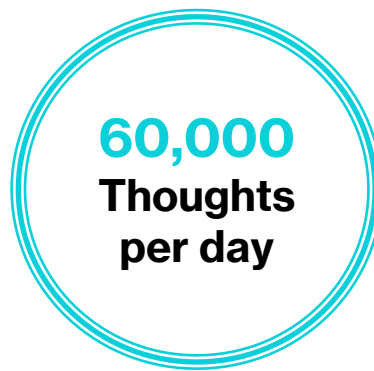
R U OK?™

A conversation could change a life.

1 in 5 Australians (16-80 years) will have a mental health episode this year. Anxiety most common group. (ABS)



R U OK? Take care of yourself & Check-IN on your Mate.



Thoughts become Reality. REFRAME. Keep Positive. RETRAIN your Brain | STOP | SNAP | SWITCH

To Reduce Stress, Negative Thoughts & Build Resilience



**Practice
Forgiveness**



**Develop
Attitude
of Gratitude**



**Cultivate
Mindfulness
(Challenge -ve
thoughts)**



**Engage
Self Care:**
Exercise, Healthy
Eating, Sleep,
joyful activities



**Build
Social Support
Networks &
Connections.**

For Stress Relief Just Breathe

1 Mindful Minute



1. INHALE
Four
Seconds



2. HOLD
Four
Seconds



**Use
Box Belly
Breathing**



4. HOLD
Four Seconds

3. EXHALE
Four
Seconds



BENEFITS:

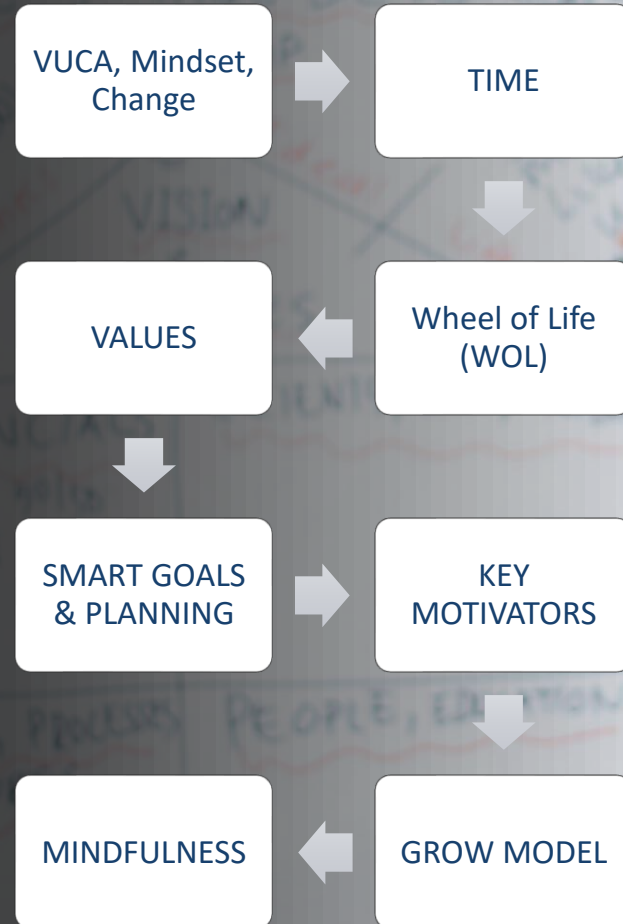


Future Ready YOU!

What is your 1 Key Action?



'The only difference between an Ordinary & EXTRAordinary Life is the little EXTRA planning you put into it!'
Thank you! xo



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